

## Solution

# Enteract

Elevating banking sales and service

To keep pace with rising customer expectations and win market share amidst mounting competition from national banks and fintechs, mid-sized financial institutions must lean into customer relationship management strategies and engineer processes that prioritize efficiency and customer experience.

Help your teams act faster, serve better and deepen customer relationships with Enteract from Fiserv, delivered in partnership with VeriPark. Built on Microsoft Dynamics 365, with the embedded AI capabilities of Microsoft Copilot, Enteract is geared for the enterprise sales and service needs of mid-sized institutions.



## Actionable customer insights

Empower your front line with a comprehensive, 360-degree profile of each client. Enteract's Single Customer View module provides at-a-glance indicators and alerts, and enables users to easily navigate aggregated customer data. Whether preparing to meet with a commercial client, answering a product inquiry for a retail customer or handling a call from a small business, users can quickly see the breadth of a customer's relationship, understand relevant engagements and identify opportunities to meet more of their financial needs.

## Configurable dashboard

## Advanced sales and relationship management

Enable teams to nurture leads, manage referrals, accelerate opportunities and cultivate their pipeline while effortlessly tracking performance against goals. Enteract's Sales and Prospect Management module, with integrated Copilot AI capabilities, helps to automate follow-ups, surface insights, and enhance productivity to shorten sales cycles and increase win rates. Whether on desktop or mobile device, Enteract ensures business development is targeted and proactive, wherever your teams work.

## Referral management

Mobile ready

## Streamlined customer onboarding and account opening

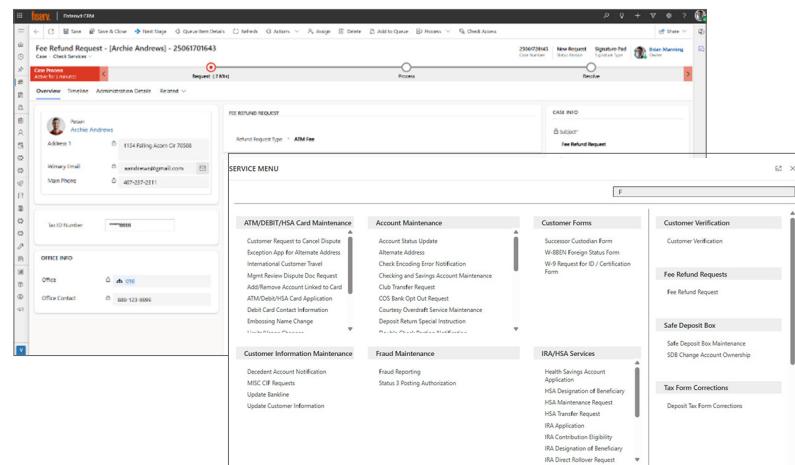
Make a strong first impression with efficient deposit account opening that gracefully handles complex use cases for consumers and businesses. Enteract's Customer Onboarding and New Account module guides users through a unified application session to onboard multiple customers, accounts and add-on services, with varied account ownerships, enforcing process compliance and ensuring data quality.

### Account open feature highlights

- Configurable product catalog
- Data validation rules
- Multiproduct application
- Integrated risk screening
- Intelligent document handling and e-signing

## Seamless customer service

Banking customer service often involves complex, error-prone manual processes that span departments and legacy systems, and require approvals and documentation. Enteract's Customer Service Management module orchestrates straight-through-processing of service requests where practical, and frictionless hand-offs when necessary, enforcing compliance, reducing operational risk and delivering consistent service experiences. With a library of preconfigured banking service requests and an intuitive configuration tool, you can quickly modify out-of-the-box templates and configure new service request types, defining business rules, routing, SLA's, document requirements and custom integrations.



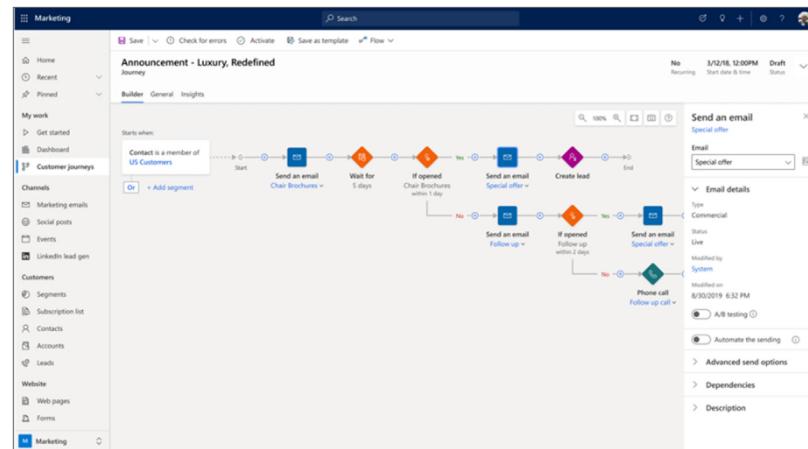
## Efficient treasury management implementation and servicing

Reduce cycle time to get commercial clients using new treasury management services faster, with specialized functionality for treasury sales, implementation and servicing. Enteract's Treasury Management module handles pricing exceptions, pro formas and proposals while coordinating the onboarding process and ongoing service requests across complex treasury products.



## Orchestrated customer journeys

Enteract leverages the Microsoft Dynamics 365 Customer Insights Journeys module to enable financial institutions to deliver personalized, multichannel marketing campaigns that generate qualified leads and foster deeper engagement. Its advanced analytics and automation tools help you map out and automate every step of a customer's journey with your business. It combines real-time marketing with AI-driven insights, enabling you to connect with your audience at the right time, with the right message, through the right channel.



## AI assistance with Microsoft CoPilot

With Microsoft Copilot integrated into Dynamics 365, Enteract users get AI-based insights and guidance as they work through sales activities and handle service requests. Copilot automates routine tasks and follow-ups, freeing staff to focus on building deeper customer relationships or closing complex deals. The result is a more proactive, efficient and personalized approach to client engagement.

### Feature highlights include

- Opportunity and case summarization
- Meeting preparation
- Email drafting
- Natural language chat
- Knowledge article suggestions
- Real-time prompts
- Post-interaction summaries

## Modular, flexible platform

Enteract's modular architecture empowers financial institutions to sequence the rollout of functionality to match business priorities and tailor licensing for each role-type. Robust, no-code configuration and low-code extensibility enable Enteract to accommodate unique business requirements and adapt quickly as needs change. System admins can quickly customize workflows and interfaces without relying on extensive IT resources. Enteract comes with a sophisticated integration framework for both real-time integration and batch data synchronization, which accelerates the facilitate custom integrations.

## Partners in your CRM success

Selecting a trusted partner with a deep understanding of your business and existing technology environment is often even more critical to the success of banking CRM initiatives than choosing the right technology solution itself. Fiserv and VeriPark combine deep expertise and a consultative approach to help Enteract clients navigate the complexities of integrating and implementing enterprise banking CRM. Together, we guide institutions through every step of configuration and integration, offering both technical and organizational best-practice recommendations to accelerate implementation, and drive effective user adoption.

# Connect with us

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